

Attach and Move Training Reference Guide



etfile

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Pre-requisite Skills

This manual is written for an audience that already is familiar with etfile. You should know, at the very least, how to scan, send or print documents into the etfile Inbox or Cabinets. You should also have the skills to utilize the Integration Toolbar and basic knowledge of what a Contact, Cabinet, Folder and Document Descriptions are in etfile.

Introduction

The purpose of the **Attach and Move** Feature is to attach a document to a client, add a description for the document and then file the document to a folder in a Cabinet in *etfile*. You can accomplish this by selecting a document in the *etfile Fileroom* within your **Inbox** or a file located in a **Cabinet** and selecting **the Attach and Move** option.

Note: There is an alternative way to file from the *etfile* Inbox by utilizing a separate module called the *etfile Workflow Console*. This module can be launched from the *etfile Fileroom* by selecting **File-Workflow Console**. Please refer to instructions on how to use the *etfile Workflow Console* which is not included in this Training Guide or contact your *etfile* Trainer for more information.

Objectives

At the completion of this lesson, you will be able to:

- Attach a document located in the Inbox or Cabinet in the *etfile Fileroom* to a Contact such as a Customer or Vendor. In some cases you are able to attach at a Policy or Claim level for certain Agency Management Systems *etfile* integrates with, such as, TAM.
- File the document to a Folder within a Cabinet, select a Code and add Document Descriptions
- Search for documents

Outline

Select Documents to Attach and Move

Attach to a contact

Add Document descriptions

Move the document to the desired location

Search for documents

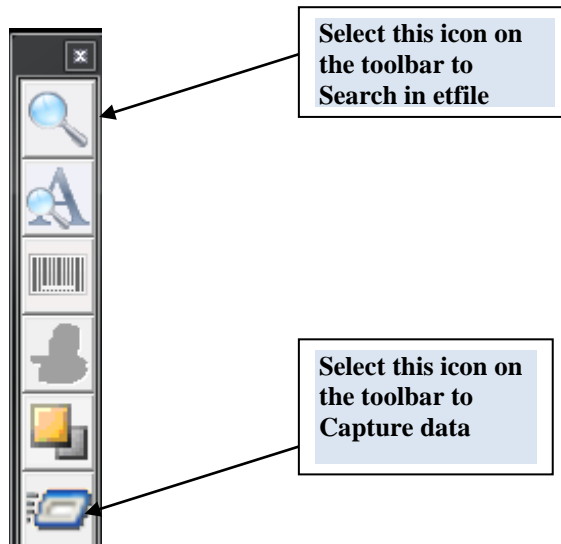
Attach and Move


When using the **Attach and Move** Feature the document will be linked to a Contact. Contacts are organized by Categories, for example, a client, vendor, student, employee or Miscellaneous. When attaching a document to a Contact this enables you to conduct a **Contact Search** in order to quickly and easily find all documents linked to specific contact, such as, a Customer.

In addition, a **Code** such as “renewal” or “invoice” is selected to describe the document and a **Document Descriptions** such as, “Invoice Number” or “Renewal Date” is entered. The Code and Document Descriptions are also attached to the document to allow for easier searching in the future for your document.

To Attach and Move a document in your Inbox:

1. Log into the *etfile Fileroom*.
2. Select the document from your **Inbox** on the left pane window in the *etfile Fileroom*. If you are not using an Agency Management System (such as TAM, Epic, Special Agent etc...) skip to **Step 5** below.
3. If you are using an Agency Management System with the *etfile Integration Toolbar*, launch the toolbar by double clicking the *etfile Integration Toolbar* icon on your desktop. The *etfile Integration Toolbar* is used to capture information at a **Customer, Activity, Policy or Claim level** and then attach to the document you are going to file. By capturing using the *etfile Integration Tollbar* you can then search using the toolbar icon that looks like a magnify glass within your Agency Management System for documents located in etfile.



4. Log into your Agency Management system (for example TAM, Epic, Special Agent...) view the customer that you would like to attach the document to and click on the Capture button  on the *etfile Integration* toolbar.

Note: Depending if the *etfile Integration* toolbar is able to capture at the Activity level, Policy or claim level you can capture from those screens instead of the Customer screen level. If you are unsure please ask your Trainer.

5. Select **Attach and Move** on the main menu bar, or select **Tools-Attach and Move** from the top menu. You can also right click on the file and choose **Attach and Move**.

Note: If you used the *etfile Integration* Toolbar you may want to be sure that you are selecting the document to **Attach and Move** first.

6. The **Attach and Move** screen will display. Choose the correct Category to display the Contacts you wish to attach to, such as, **Customer** by selecting the drop down button below the **Attach To** box on the upper left side.

Note: If you used the *etfile Integration Toolbar* it should be displaying the correct Customer information. If you did not use the *etfile Integration Toolbar* you can select the correct customer in the list below the drop down box.

Type in the first few letters of the Customer's name in the **Enter Client Code** box. Once you find the Customer (or Contact type you choose) select the Customer Contact in the box so it displays the **Client Code** in the **Enter Client Code** field.

7. The document will appear in the top window of the **Attach and Move** box. You can select one or more pages or not select any and the system will move the entire document.
8. Make sure the **Attach To** and **Add Description** check boxes are selected.
9. To file the document to a Cabinet in the Fileroom choose the correct Cabinet to **MOVE** the document to on the right side where it says **Move To**. Select the **Drop Down** to choose a Cabinet to file the document to. If you do not see the Cabinet you want to file to check the Cabinet permissions or contact your Administrator of *etfile*.
10. Select **Auto-Find Folder** next to the Cabinet **Drop Down** box. This will enable *etfile* to find the Contact Folder that has already been created and filed to if it exists. If no documents have been filed and linked to this Contact a folder would not have been created. If no Contact folder is found then choose the **Create Folder** button to create a Contact Folder.

EXAMPLE 1:

Select the Document in your *Inbox* in the *etfile Fileroom* or a Cabinet and open the *Attach and Move Screen* and follow the steps below to Attach and Move a document:

Step 1: Select all pages if shown in the Preview Window or a specific page to Attach and Move

Step 2: Select Attach to and Add Description

Step 3: Choose a Contact Category

Step 4: Select Add to add a description for the document if you did not use the Toolbar to capture the description from your Agency Management System, such as, TAM or Special Agent

Step 5: Below Move To Select a Cabinet using the Drop Down Arrow to file the document to

Step 6: Select Auto-Find Folder

Step 7: Click Create Folder if the Contact Folder is not automatically found and displayed below the Cabinet selected

Step 8 (final Step): Select Attach and Move

The screenshot shows the 'Attach & Move' window for a file named 'test123'. The preview window displays a document with a blue border. The 'Attach To' section has a dropdown menu set to 'Customers' and a table of contacts. The 'Move To' section shows a tree view with 'Accounting' and 'National Grid' folders. The 'Add Description' section has an 'Add' button. The 'Attach & Move' button is at the bottom right.

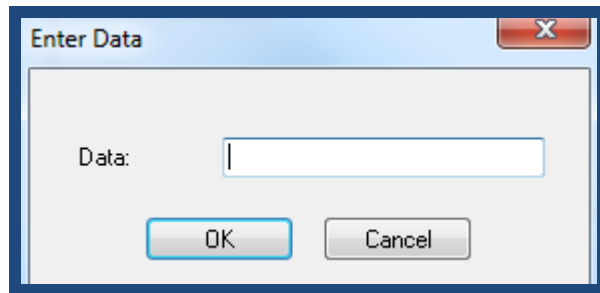
Contact	Client Name	Address
LIABILITY	Elkal, Inc.	
LINTRO1	Robert Linton	Test 123
MISTJA1	Jai Mistry CHAN...	Test 123 Adding ne...
NATIGRI	National Grid	
NEUMA-1	Neumann's Barb...	3350 Joe Orr Road

11. Choose **Add** under **Description** on the bottom left to add a **Document Description** to attach to your document. Adding a Description will make finding the document easier in the future since you can search on the description and use a Filter for the Codes.

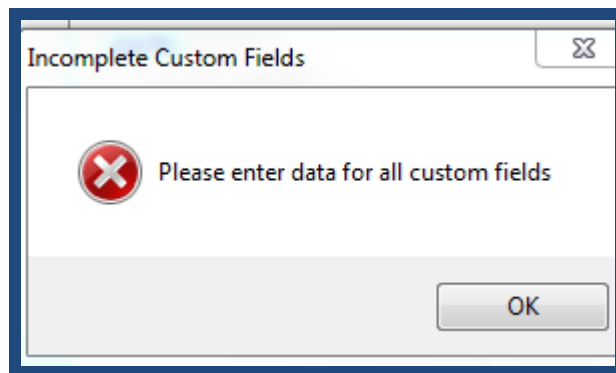
Note: If you used the *etfile Integration Toolbar* to capture information then the description for the customer, activity, policy or claim (depending on where you captured from) will display to the right of the Description/Add field and you can skip to step 14 or you can edit what was captured and follow the steps below. If you captured at a customer or activity level and your systems allows us to capture the policy and claim you can follow the steps below to edit the description and choose a policy or claim from the Policy or Claim Tab displayed when you **ADD** or **EDIT** a Description.

12. Choose **Add** then select a **Code** on the left that best describes the document you are filing. After you choose a **Code** look to the right under **Description**.

13. Next, type in a description that will describe the document you are filing. If the **Description** box on the right has any words in brackets such as <date> this is a Custom Field and you cannot click OK on this screen until you click on the word in the brackets and type in text in the Enter Data box or pick a date from the calendar if it is a date field.



14. If you try to click OK on this screen without entering data in the custom fields you will see the message below displayed.



If the etfile Toolbar can capture at a Policy or Claim level you can select a Policy or Claim by selecting the tabs and choosing the available Policy or Claim for this customer chosen

First choose a Code. The Code can be filtered on later when searching

Select Description: FELIHOM - Felix Home Improvement

Description Policy Claim

APPLICATION RENEWH
BACKFILE
CHECK
COI
DOH
ENDORSE
EPKG
HOMEPOL
INVOICE
LOANAPP
POLICY
RENEWAL

Description:
<DATE>

Notes:

Code: DOH

OK Cancel

A word in < > is a custom field you must click the word and enter data for this Description before you can click OK

Additional descriptions to help describe the document can be typed in the NOTES box which are searchable

15. The **Notes** field allows you to add more information that may help you remember important facts about this document. The more information you add up front when you file the document the easier it will be retrieving the document in the future. Type in any text in this field that further describes this document to file.
16. Lastly, select **Attach and Move** at the bottom right. The document should now move from the previous location, such as your **Inbox**, to the new location such as, the **Commercial Lines Cabinet**. The document should also now be attached to the correct customer with the Code and description linked to this document for searching in the future.

Searching for Documents

Introduction:

There are several ways to **Search** for documents in *etfile* which is dependent on whether or not you are using the *etfile Integration Toolbar*. If you are not sure if you are using this, do not know how to use it or want more information please contact your *etfile Trainer* or *Technical Support*.

To Search with the etfile Integration Toolbar by Customer:

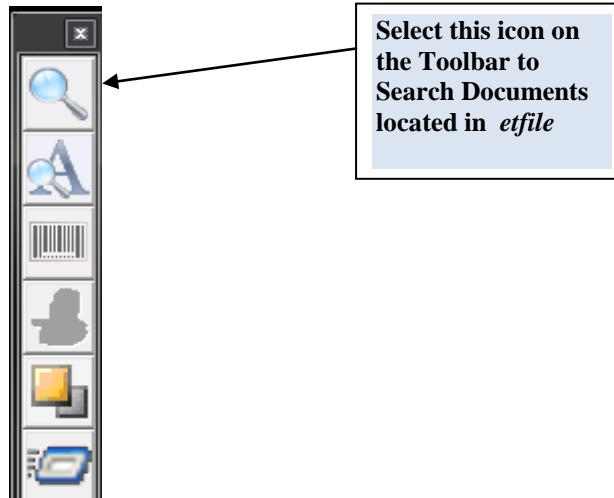
1. Log into your Agency Management System, such as, TAM or Special Agent.

Note: Depending on the Agency System you are using is what determines if we can search on a Customer, Activity, Policy or Claim level. If you are unsure please contact your *etfile Trainer* or our *Technical Support Group*. If you did not use the *etfile Integration Toolbar* to capture at the Activity, Policy or Claim level then you cannot search at that level using the Toolbar not would be able to at the Customer level.

2. Launch the *etfile Integration Toolbar* if it is not already open

3. To **Search by Customer**, which allows you to view all documents attached to a certain Customer, **Select the Customer** in your Agency Management System, such as, TAM or Special Agent. **If you want to search by Activity, Policy or at a Claim level skip to step 7.** Then on the *etfile Integration Toolbar* choose the **Magnify Glass icon** at the top of the *Toolbar*.

Note: Special Agent and other Agency Management systems can only search capture and search at a Customer level. Contact your *etfile Trainer* or *Technical Support* if you are unsure.



4. The **Search by Description** screen is displayed and the Customer selected in the Agency management System such as TAM or Special Agent with the *etfile Integration Toolbar* will be displayed.
5. The documents found in *etfile* are located in the upper viewing window. You can select all by holding down the **SHIFT** key and clicking your mouse on the first and last document, or hold down your **CTRL** key while you select with your mouse the documents you want or you can select just one to view. Once you decide how many to view click the **SEARCH** button on the bottom of this window as displayed below.
6. By selecting the **drop down arrow** next to the **Filter** field you can select a specific **CODE** to filter the document list to narrow down your search. The **CODE** was chosen when you filed your document.

Click the **Filter** drop down to select a **CODE** to narrow down the list of documents shown for this customer

Select which documents you wish to view in your Search Results Window in *etfile*

The **Contact (Customer) Code** should be displayed if you used the **Toolbar**.

Select **Search** to view your search results in the *etfile* Search window

Search by Descriptions

Filter: **<All>** Folder: ☐ Select All ☐ Include Archives

T.	Code	Date	Description
	ENDORSE	3/3/2016	Endorsement Type - Auto
	CANF	12/10/2015	@Cancel request follow up
	INVOICE	11/19/2015	Invoice 123456

Clients Data

Customers

Contact	Client Name	Address
NATIGRI	National Grid	
NEUMA-1	Neumann's Barb...	3350 Joe Orr Road
RAKPL-1	Rak Plumbing &	14990 Ridgeland &

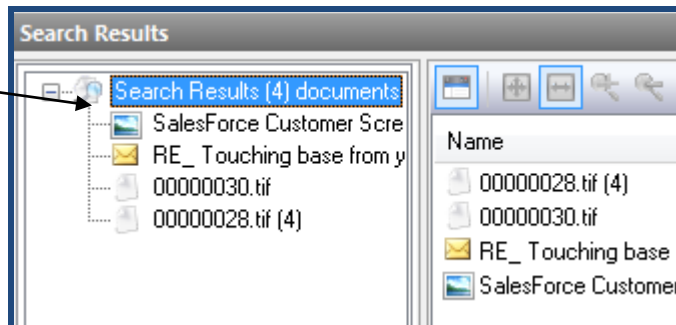
Contact:

Notes for Selected Description

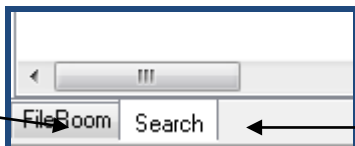
Note: Selecting the **Search** feature on main menu of *etfile*, **Tools-Search** or **Tools-Search by Description** will also allow you to search in *etfile* by Customer without using the *etfile Integration Toolbar*.

To Search with the etfile Integration Toolbar by Activity, Policy or Claim:

1. If you captured data at an Activity, Policy or Claim level using the Toolbar when you filed a document in *etfile* then you can search using the Toolbar. Open the customer in your Agency Management System, such as TAM or Epic. With the **Activity, Policy or Claim Screen** open for a **Customer Select** the *etfile Integration* Toolbar's **Magnify Glass icon**. The documents found for the search will appear in the *etfile Search Results* Window.



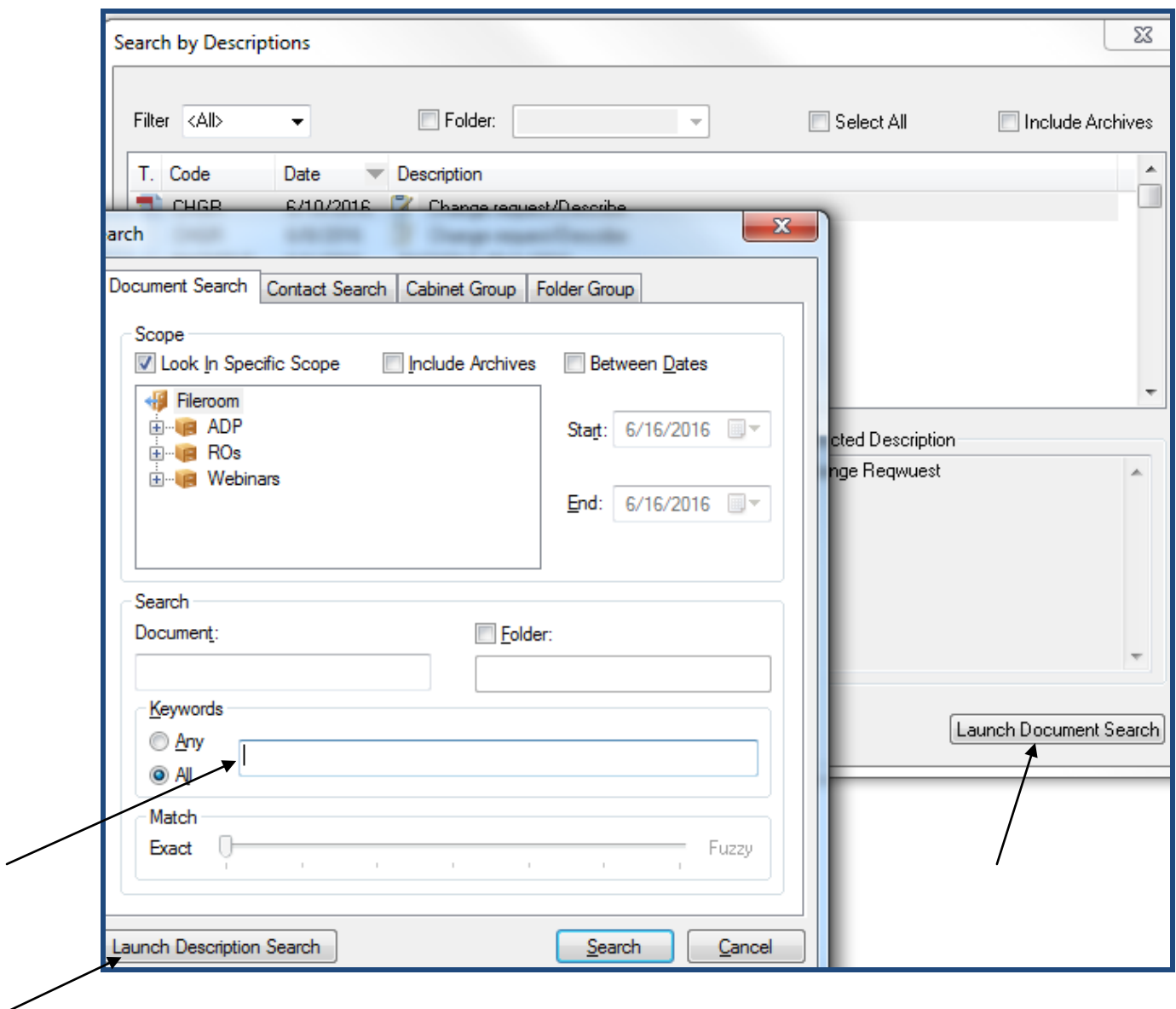
2. Located at the bottom left of the etfile Fileroom are two tabs, **FileRoom** and **Search**. You can click on each one to go back and forth from the Search results window and the Fileroom in *etfile*.



To Search with Document Search:

1. In addition to searching by customer with the **Search by Description** option there is another **Search** that can be launched from the **Search by Description** window by choosing **Launch Document Search** on the bottom right of the screen.

Note: Click on **Launch Description Search** to toggle back to the **Search by Description** window.



2. Type in a **Keyword** to search for and click **Search**. This will search the Keyword you type in within **Codes, Descriptions, filenames and notes of a document** in *etfile*. This could be a last resort to find

documents if there are issues finding a document with the Customer, Activity, Policy or Claim level search. You can also choose **Between Dates** and search specific dates.